New TOR.

planning, monitoring & evaluation
Department:
Planning, Monitoring and Evaluation
REPUBLIC OF SOUTH AFRICA

TERMS OF REFERENCE

NDP 2030

SCM /Tender Ref #:	4951 / DPME 05-2019/20

Request for proposals for:	ICT Research Support Membership for 36 months
Compulsory Briefing Session	07 May 2019

Bid closing date and time as well as the date and time of briefing session (if any) are indicated on the attached SBD1. Quotations / proposals received after the closing date and time indicated on SBD 1 will not be accepted.

Bidders must provide <u>one original</u> and <u>5 (five) copies</u> of proposals submitted.

Only 1 (one) original price proposal and SBDs are required.

Estimated project start date:	Expected project duration (Months)
01 June 2019	3 years

1. BID INFORMATION

Information and guidelines on the format and delivery of bids are contained in the attached bid documents. Please take note of the closing date and date of compulsory briefing session (if any).

2. PROPOSAL FORMAT

A detailed proposal in response to this ToR must be submitted. The proposal should contain all the information required to evaluate the bid against the requirements stipulated in this terms of reference. The following must be attached to the proposal as annexures:

- **Annexure B1**: Summary of past experience (Must use attached Excel template)
- **Annexure B2:** Pricing information. Price proposals must <u>include VAT</u> and should be fully inclusive to deliver the <u>all outputs</u> indicated in the terms of reference (Must use attached Excel template).
- The published terms of reference (this document, including Annexure A to this document).
- All other forms / certificates required (see bid documents).

3. CONDITIONS OF BID

Detailed conditions applicable to all bids are contained in the bid documents accompanying this Terms of Reference. Only suppliers that meet all the requirements stipulated in the terms of reference and bid documents will be considered.

No late bids will be accepted. Only bids from service providers that attended the compulsory briefing session (if specified above) will be considered. Bids must be valid for a minimum period of 120 days after the closing date.

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1. BACKGROUND

Annexure A contains a detailed description of the requirements for this project, including:
- Background / context
- Problem statement / purpose
- Objectives and scope of project
- Proposed methodology / approach
- Deliverables and time frames

2. EXPERIENCE / PAST PERFORMANCE

2.1. Company Experience required

2.1.1. The prospective bidder must have ten or more years' experience delivering service outlined in mandatory evaluation criteria table (Part2).

2.2. Past performance

2.2.1. The bidders must have verifiable experience with contactable references on the provision of similar service for **5** organisations in the public or private sectors (depending on skill). If proof is not attached the proposal will be disqualified. *Proof to be attached in Annexure B.*

2.2.2. The Department reserves the right to reject a bid if the service provider failed to perform satisfactorily on similar assignments.

3. COSTING METHODOLOGY

Prices must be <u>inclusive of VAT</u> (if VAT registered) and must include <u>all costs to fully execute all deliverables</u> indicated in this ToR. No variation in contract price will be permitted. Annexure B2 must be used to summarise costing.

4. EVALUATION OF BIDS

4.1. Administrative requirements

Annexures B1 to B2 **must** be completed using Microsoft Excel or compatible software. Annexures completed by hand (in writing) will not be accepted and such bids will be regarded as administratively non-compliant.

Only bids / quotes that comply with all administrative requirements and that submitted all required bid documents (acceptable bids) will be considered during the functional evaluation phase. Only acceptable bids / quotes will be scored by the Bid Evaluation Committee against the functional criteria indicated in this Terms of Reference.

4.2. Scoring of bids (functional criteria)

The following weighting and scoring system will be applied to the evaluation of all functional criteria:

Weight allocation	Scoring system
1 – Value adding requirement (minimum score of 2)	1 – Does not comply with the requirements
3 – Important requirement (minimum score of 6 or 9)	2 – Partial compliance with requirements
	3 – Full compliance with requirements
5 – Essential requirement / integral part of project (minimum score of 15)	4 – Exceeds requirements

Score per criteria: The final score obtained by a bidder for each criteria will be calculated by multiplying the <u>weight</u> and the <u>score indicated by each Bid Evaluation Panel member</u> and then by averaging the scores of all panel members. The average score per criteria is expressed as a number.

The **overall score** obtained by a bidder (expressed as a percentage) will be calculated as follows:

$$Overall\ Score\ (\%) = \frac{Sum\ of\ average\ scores\ for\ all\ criteria}{Sum\ of\ weights\ X\ 4}\ X\ 100$$

4.3. Functional evaluation Part 1 – Quantitative criteria

Part 1: Minimum functional requirements: Only bids that scored at least the minimum score <u>for each criteria</u> will proceed to functional evaluation part 2. In cases where bidders submitted insufficient <u>evidence</u> or where <u>evidence</u> is ambiguous, bidders <u>may</u> be requested to provide additional <u>evidence</u> and <u>may</u> be re-scored based on this information. Additional information submitted may only be used as evidence to substantiate what is already contained in the proposal. The costing and content of proposals may not be amended.

Functional Evaluation Criteria		Weight	Min. Score
1.1	Company experience as highlighted above, as per paragraph 2.1.1 1= Company does not meet the minimum requirements. 3= Company does meets the minimum requirements 4= Company exceeds the minimum requirements	5	15
1.2.	The bidders must have verifiable experience with contactable references on the provision of similar service for **5** organisations in the public or private sectors, as per paragraph 2.2.1 1= Company does not meet the minimum requirements. 3= Company does meets the minimum requirements 4= Company exceeds the minimum requirements	3	9

4.4. Functional evaluation Part 2

The functional evaluation criteria indicated below will be applied during Part 2 of functional evaluation to all bids that met the minimum requirements stipulated under Functional evaluation Part 1. During part 2 the Bid Evaluation Committee may:
- Evaluate and score bids based on the bid documents and proposals submitted; or
- Provisionally evaluate and score bidders based on proposals submitted and then invite bidders that met all requirements under Part 1 and a provisional overall score of at least 60% for both functional evaluation parts 1 and 2, to present their bids.

The final evaluation and scoring of bids will based on the proposals submitted, as well as on information provided by bidders during bid presentations (if applicable). Presentations can be used to summarise and clarify bids and may not substantially depart from the proposals submitted.

If a bidder is unable to attend a bid presentation on the date requested by the Bid Evaluation Committee, then the bidder must be afforded another opportunity within 5 working days. If a bidder is for a second time unable to attend a bid presentation then the bid must be evaluated based on the bid documents and proposals submitted only.

Part 2: Minimum functional requirements: Only bids that obtained the <u>minimum score for each criteria</u> as well as an <u>overall score of at least 75%</u> for both functional evaluation parts 1 and 2, will proceed to Price/PPPFA evaluation.

CRITERIA		Weight	Yes	No
1.1	Membership for ICT research support subscription for 36 months (Annexure A. 3.1).	3		

CRITERIA		Weight	Yes	No
1.2	Access to ICT research portal that includes the following (Annexure A.par3.1): o Strategic (executive) analytical capacity o Technical (management) analytical capacity o Future projections o Benchmarking of industry and technology o Analysis reports on different tools o Cost analysis o Best practices	3		
1.3	The research content and advisory must include the following domains (annexure a. par 3.1) : o Applications o Data and Analytics o Business Process Improvement o Enterprise Architecture o IT Infrastructure and Operations o Program and Portfolio Management o Security and Risk/ Management o Sourcing and Vendor Relations	3		
1.4	The service should include day-to-day support , including ensuring that inquiries are adequately addressed	3		
1.5	Access to Conference / round tables etc.	3		
1.6	Presentation	3		
Yes = score of 3 *No = score of 1*				

4.5. Price / BBBEE / PPPFA

Only bids that meet the minimum administrative and functional requirements / specifications indicated in the ToR (qualifying bids) will be evaluated in terms of the Preferential Procurement Framework Act and related regulations – see attached bid documents. The evaluation method (80/20 or 90/10) and preference points allocation applicable to this bid are indicated in the attached SBD 6.1.

5. CONTRACT MANAGEMENT

The successful bidder will be required to enter into a service level agreement (SLA) with the Department of Planning, Monitoring and Evaluation. The National Treasury General Conditions of Contract (GCC) will form part of the SLA to be concluded between DPME and the successful bidder. A copy of the standard DPME SLA is available on the DPME tenders website. Bidders should familiarise themselves the content of the standard template.

Bidders should note that:
- All information related to this bid, or information provided to the service provider subsequent to the award of this bid, must be treated as confidential and may not be disclosed in any way to third parties without the explicit written consent of DPME.
- All right, title and ownership of any Intellectual Property developed by or for the Service Provider or DPME independently and outside of execution/production of the Deliverables related to this bid, and provided during the course of this project ("Background IP") shall remain the sole property of the party providing the Background IP.
- To the extent that the Service Provider utilises any of its Background IP in connection with the Deliverables, such Background IP shall remain the property of the Service Provider and DPME shall acquire no right or interest therein, save that, upon payment of the applicable consideration, the Service Provider shall grant DPME a non-

exclusive, royalty-free, non-transferable licence to use such Background IP strictly for purposes of making beneficial use of the Deliverables into which such Background IP has been incorporated.

- All Intellectual Property rights in Bespoke Deliverables are or will be vested in and owned by DPME unless specifically agreed otherwise in writing. The Service Provider agrees that it shall not, under any circumstances, question or dispute the rights and ownership of DPME in and to the Bespoke Deliverables. DPME shall grant the Service Provider a non-exclusive, royalty free, non-transferable licence to use the Bespoke Deliverables for the purpose of performing its obligations under this project.
- The Service Provider may not publish or sell, in whole or in part, any Bespoke Deliverables emanating from this project without the explicit written consent of DPME.
- The Copyright of any Bespoke Deliverables shall vest in DPME.

6. SPECIAL CONDITIONS APPLICABLE TO THIS BID

6.1. The department reserves the right not to award the contract.

TERMS OF REFERENCE: ANNEXURE A

SCM /Tender Ref #:	4951 / DPME 05-2019/20

Request for proposals for:	ICT Research Support Membership for 36 months

1. BACKGROUND/ CONTEXT

DPME's Information and Communication Technology Management (ICTM) unit manages the provision of information communications technologies and the management of the services provided across DPME. This entails the use of ICT's to support the departmental strategic objective, which changes frequently and the environment is impacted by external environmental changes, being fast changing technology, security, and the costs.

The unit is also responsible for the implementation of new technologies, not limited to cloud technologies, the fourth industrial revolution solution (AI), digitise where possible and lead the department in developing and secure departmental information at an economically reasonable way. Unfortunately, all these activities had to be performed in the absence of availability and access to an effective analytical and research tool to generate reports and intelligence for management decisions.

The ICT research membership would assist the unit in –enhancing the current value that unit will bring in being responsive to the next 5 years; where the department is currently enhancing the collation and use integration of data.

2. PROBLEM STATEMENT / PURPOSE

The department has implemented the Government ICT governance policy and is on the continuous improvement phase, which is also affecting DPME IT unit. Given its mandate, the unit can only provide limited support and knowledge to meet departmental objectives, as discussed above.

To address the challenge the unit would like to subscribe for ICT research membership with access for the strategic level and technical capacity) , which will benefit IT governance . The membership should provide or I focus at the different technologies and providers thereof, without any allegiance to any technology providers however should analyse all these. This should be based on all technologies and providers thereof whether local or international.

Conducting IT intelligence through an effective analytical and research tool (research library portal) before implementation will save costs, time, enable fast risk mitigation and eliminate costly mistakes. The research library portal will not be limited to future projections, benchmarking of both technology and industry, vendor ratings, analysis on the different tools strong and weak points and cost analysis, provide the environment to learn from best practices, provide the team with knowledge from the various tools and provide IT templates where necessary.

3. OBJECTIVES AND SCOPE OF PROJECT

3.1. The main objective of this initiative is to acquire a 3 years membership that includes the following:

Item	Requirements
Services	1. Assess and advise the internal governance document are agile and support business objectives. 2. Validating and reviewing e.g. contracts and decisions, assist in streamlining the ICT process to ensure agility of the ICT process. 3. Advisory on corporate and IT governance.

Item	Requirements
Access to the research portal which contains an online library with:	1. Strategic (executive) analytical capacity 2. Technical (management) analytical capacity 3. Future projections 4. Benchmarking of industry and technology 5. Cost analysis 6. Access to Best practices and methodologies thereof 7. Independent vendor assessment, research, reviews
The membership must also include the following:	1. Leadership coaching and executive workshops 2. Allocate(s) resource who will facilitate the needs of the department 3. Meetings and/or workshops with the specialist(s) should there be a need,; 4. Direct access to the analysts for briefing and enquiries as and when necessary 5. Invitations to any other IT executive programs/events or roundtables. with other industry leaders and these should at no costs.

4. DELIVERABLES AND TIME FRAMES

4.1. The service is a three (3) years subscription for membership. The membership should include the following content:

4.1.1. ICT research reports and tools library

4.1.2. Personalized service with a dedicated team and onsite visits

4.1.3. Interactive networking platforms with professional (*i.e.* teleconferencing, online connections, peer networking)

4.1.4. Access to Conferences, events or round tables etc.